Grants.gov Release 16.2 Applicant Release Notes

Version 1

Production Deployment: April 21-23, 2018
Training Deployment: April 23-25, 2018



Release 16.2 Summary

- Expanded Roles and Privileges
- Workspace
 - Add View Application tab to expand Application/Form view to include attachments
 - Add Attachments tab for a summary of forms attachments
 - Make Apply button more prominent
- Discussion Forum
- Form Instructions

EXPANDED ROLES AND PRIVILEGES

Expanded Roles and Privileges

https://www.grants.gov/web/grants/applicants/workspace-overview.html

- Provide Organizations with the option to use Grants.gov built-in roles (no changes required) or define their own custom roles
- Grants.gov Built-in Roles
 - Expanded AOR Expanded Access without MPIN entry
 - Standard AOR
 - Workspace Manager
- Manage Roles
 - Create/delete custom roles as needed for the Organization
 - Activate/inactivate Grants.gov built-in roles
- EBiz POC: Limit functionality to Manage Organization and Manage Applicants/Certificates



Applicant Roles

Privilege	Туре	Individual Applicant	EBiz POC	Built-in: Expanded AOR	Built-in: Standard AOR	Built-in: Workspace Manager	Sample Custom: Principal Investigator (PI)	Sample Custom: Basic Workspace Roles Assigner	<u>Sample</u> <u>Custom:</u> Workspace Coordinator
Manage Organization	Expanded		✓	✓					
View Organization	Standard		N/A	N/A	✓				
Manage Applicants – All Roles	Expanded		✓	✓					
Manage Applicants – Basic Workspace Roles	Standard		N/A	N/A	✓			✓	
Manage Certificates	Expanded		✓	✓					
Create Workspace	Basic	✓		✓	✓	✓	✓		
Own Workspace	Basic			✓	✓	✓	✓		✓
Manage Participants for Organization Workspaces	Expanded			✓					
Manage Participants for My Workspaces	Standard			N/A	✓			✓	
Participant Activities for Organization Workspaces	Expanded			✓					
Submit Applications for Organization Workspaces	Expanded			✓					
Submit Applications for My Workspaces	Standard	✓		N/A	✓				
Check Application Status for Organization	Expanded			✓					

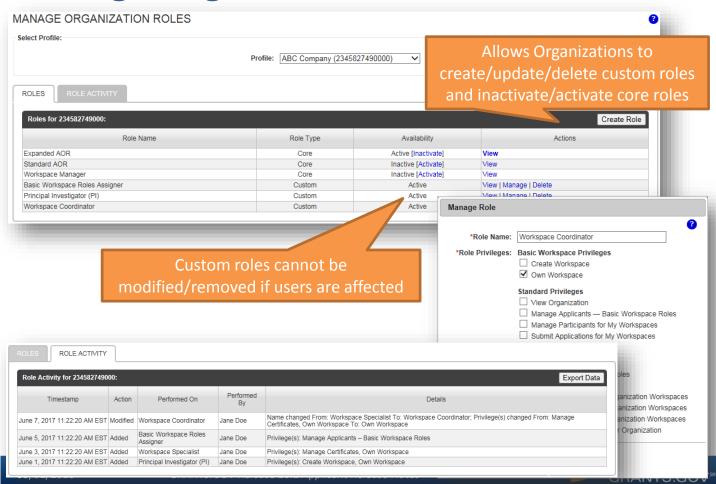
Notes:

- All Workspace Participants can perform all participant activities
- Each Organization Workspace has a Workspace Owner who can also Manage Participants, Reopen/Delete, Override Locks, Get Updated Grantor Package, Complete and Notify AOR
- Each Individual Workspace has a Workspace Owner who can Reopen/Delete/Get Updated Grantor Package Other privileges are not applicable

Applicant Privileges

#	Privilege	Туре	Definition	
1	Manage Organization	Expanded	View SAM fields, View/Manage Organization Preferences, View/Manage Organization Roles	
2	View Organization	Standard	View Organization Preferences, SAM fields, and Organization Roles	
3	Manage Applicants – All Roles	Expanded	Assign/Revoke All Roles for Applicants and Delete Applicants	
4	Manage Applicants – Basic Workspace Roles	Standard	Assign/Revoke roles which contain only Create Workspace, Own Workspace, or both privilege(s)	
5	Manage Certificates	Expanded	Assign/Revoke certificate roles	
6	Create Workspace	Basic	Create/Copy Workspace	
7	Own Workspace	Basic	Currently Workspace Owner, or eligible to be assigned as Workspace Owner (after added as a Participant)	
8	Manage Participants for Organization Workspaces	Expanded	Add/Remove Workspace participants, Assign/Revoke Access, assign	
9	Manage Participants for My Workspaces	Standard	Workspace Owner	
10	Participant Activities for Organization Workspaces	Expanded	Preview/Update/Reuse Workspace Forms offline or online (including lock/unlock), preview/check application, Invoke Grantor validation (without being a Participant), and add/remove optional forms	
11	Submit Applications for Organization Workspaces	Expanded	Participant Activities for Organization Workspaces, as well as Submit applications, Override Workspace Locks, Reopen Workspace, Get Updated Grantor Package (when Grantors change list of forms), Delete Workspaces for the Organization, and Check Application Status for Organization	
12	Submit Applications for My Workspaces	Standard	Submit applications, Override Workspace Locks, Reopen Workspace. Requires access to All Forms including Budget if Workspace participant, and Check My Application Status	
13	Check Application Status for Organization	Expanded	View Check Application Status pages	

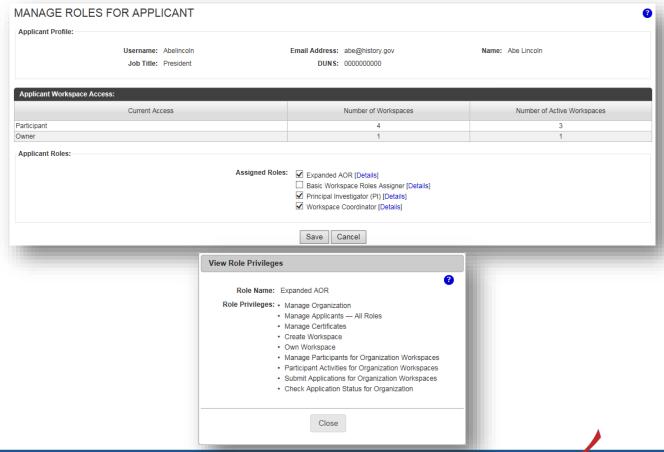
Manage Organization Roles



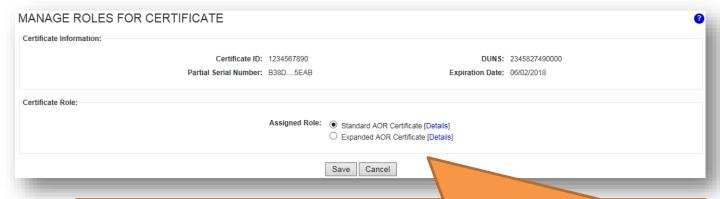
Mange Applicants

Standard AORs and EBiz POC / Expanded AORs use consolidated screen to manage Applicants MANAGE APPLICANTS Select Profile: ABC Company (2345827490000) V Please enter criteria and click Search: Username: First Name: Last Name: Search Export Detailed Data Applicants for 234582749000: First Name Middle Initial Email Address Phone Number Has Roles Account Status Username Last Name Actions Joesmith Joe Α Smith joe.a.smith@organization.org 703-555-1212 Yes Active Delete | Manage Roles | Manage Workspace Access В Janeanderson Jane Anderson iane.b.anderson@organization.org 703-555-1213 Yes Active Delete | Manage Roles | Manage Workspace Access С 703-555-1214 Alexiohnson Johnson alex.c.johnson@organization.org Yes Active Delete | Manage Roles | Manage Workspace Access Taniajones Tania D Jones tania.d.jones@organization.org 703-555-1215 No Inactive Delete | Manage Roles | Manage Workspace Access Gregdoe Grea Ε Doe greg.e.doe@organization.org 703-555-1216 No Inactive Delete | Manage Roles | Manage Workspace Access

Manage Applicants – Assign Roles

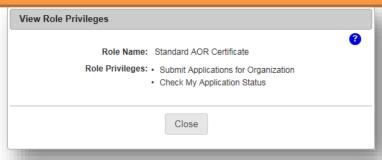


Manage Certificates – Assign Roles



Clarified Certificate roles:

- Standard AOR Certificate Submit and retrieve its own submission
- Expanded AOR Certificate Submit and retrieve all Organization submissions



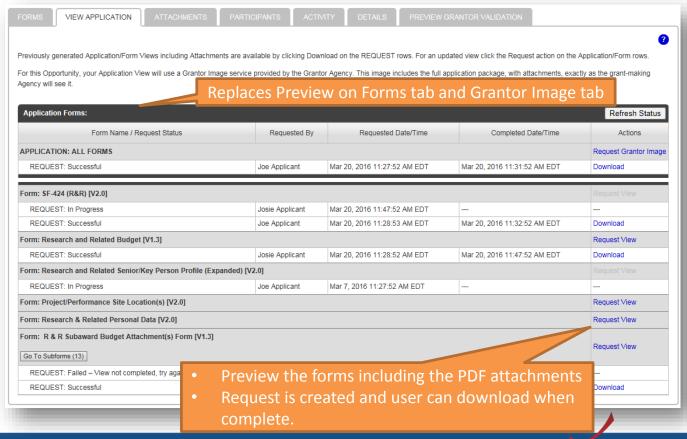
WORKSPACE ENHANCEMENTS

Workspace Enhancements

- Two new tabs
 - View Application tab: expand Application/Form view to include attachments
 - Attachments tab: summary of forms attachments
- Forms tab
 - Click on Form Name opens Webform
 - Easy navigation back to search results
 - More intuitive navigation to Subforms
- Activity tab
 - Add Activity record with list of validation errors
- Make Apply button more prominent

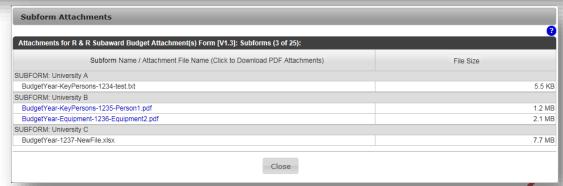


Manage Workspace: View Application Tab



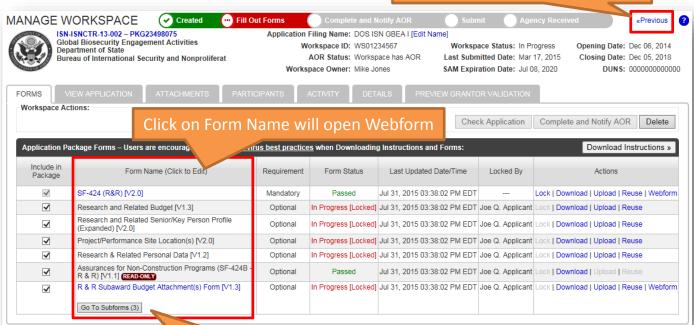
Manage Workspace: Attachments Tab





Manage Workspace: Forms Tab

Easy navigation back to Manage Workspaces search results

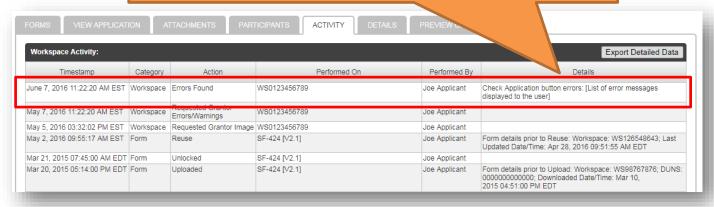


More intuitive navigation to Subforms

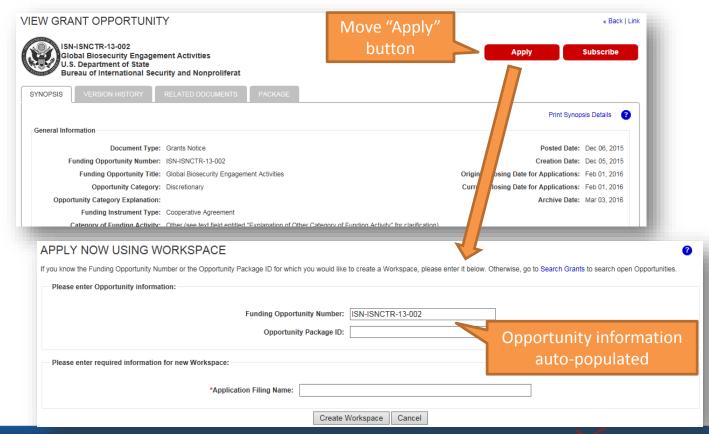
Manage Workspace: Activity Tab

New activity record will track errors received during:

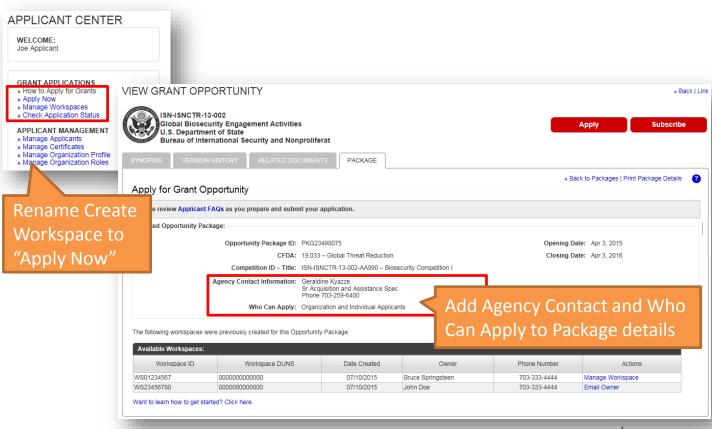
- Check Application
- Complete and Notify AOR
- Sign and Submit



View Grant Opportunity



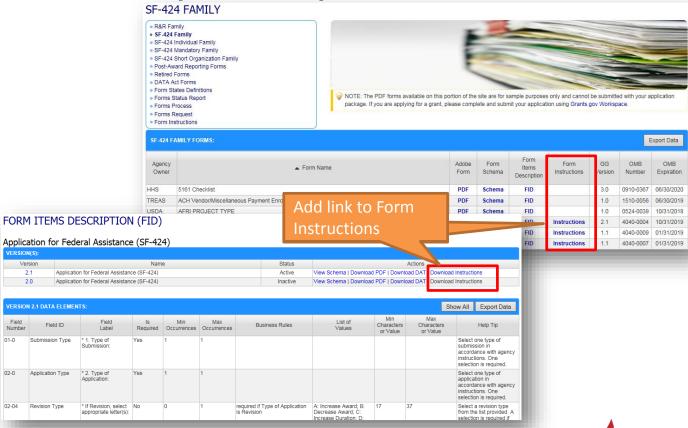
Apply Using Workspace



Discussion Forum

- Add discussion forum to facilitate communications across Grants community
 - Participate by logging in with Grants.gov account
 - Immediate message posting (post-moderation)
- Benefits
 - Create multiple customized groups for targeted discussions
 - Share documentation and links across groups
 - Create searchable knowledge base/ FAQs
 - Transition Applicant ListServ to forum

Forms Repository



Re-entering Password

 Applicants will no longer need to reenter their password to update their Account details, email address, submit Workspace, and delete Workspace

RELEASE 16.2 USER ACCEPTANCE TESTING

User Acceptance Testing (UAT)

- Release 16.2 UAT Dates:
 - Round 1: 03/26/2018 to 04/04/2018
 - Round 2: 04/10/2018 to 04/12/2018
- To sign up or if you have any questions, please send an email to:
 - To: <u>UAT@grants.gov</u>
- Please provide the following information when you sign up:
 - Participant contact information
 - Type of user (Applicant UI, Applicant S2S, Agency UI, Agency S2S)
 - Participation (confirmed or tentative)
- Guidelines will be provided before the testing begins. Users are encouraged to do ad-hoc testing as well and inform Grants.gov on what was tested.

SUMMARY OF USER IMPACTS

Upcoming Changes with User Impact

• For the latest information on upcoming changes with user impacts, please check out the Grants.gov Notices page.

http://www.grants.gov/web/grants/outreach/grants-gov-notices.html

Affected Users	Effective Date	Notice
Applicant	March 31, 2018	Last day to submit Legacy PDF Package applications through Grants.gov
Applicant S2S, Applicant	March 31, 2018	For Grants.gov Training Environment – Disable Transport Layer Security (TLS) 1.0 and 1.1 Support
Applicant	April 21, 2018 (Release 16.2)	EBiz POC privileges changed to manage Organization and manage Applicants / Certificates
Applicant S2S	May 19, 2018 (Release 16.2.1)	Applicant S2S transition period from submission header V1.0 to new submission header V2.0 Hash not included in header V2.0, and will no longer be validated for either header version
Applicant S2S, Applicant	May 31, 2018	For Grants.gov Production Environment – Disable Transport Layer Security (TLS) 1.0 and 1.1 Support
Applicant S2S	October 6, 2018 (Release 16.3)	Grants.gov will only accept new submission header V2.0 for Applicant S2S Get Opportunities and Get Opportunity Plus Comp Title will no longer be supported